APPENDIX C

LEA-LEC Tape Match Procedures

LEA/LEC TAPE MATCH INSTRUCTIONS

(PC environment with Microsoft OFFICE including ACCESS installed only)

1. Download PGP software and establish a password
   (Be sure to write down your password in a secure location.)
   PGP website address - www.pgpi.org/products/pgp/versions/freeware
   (For assistance, contact Han Nhan at 916 440-7253 or hnhan@CDHS.ca.gov.)

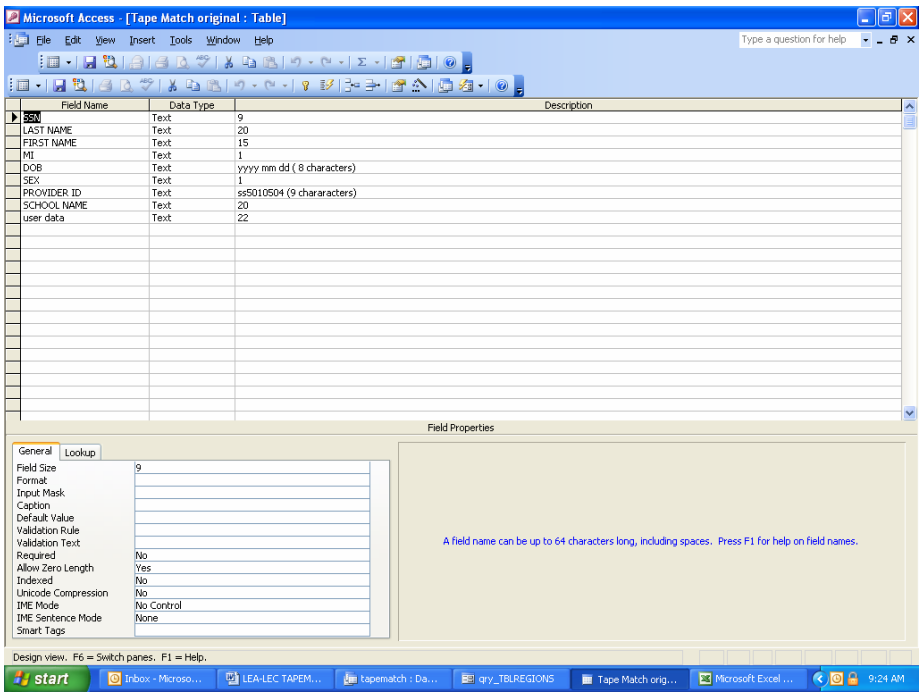
2. To request a "provider id" number from CDHS, apply at www.CDHS.ca.gov/lea.

3. In MS OFFICE ACCESS create a new database. Within the database create a new table and call it "CDHS tapematch."

4. Following is the name, type, and length of the fields that *must be in the database*:

   SSN Text 9, LAST NAME Text 20, FIRST NAME Text 15, MI Text 1, DOB Text 8, SEX Text 1, PROVIDER ID Text 9, SCHOOL NAME Text 20, USER DATA Text 22.

See www.CDHS.ca.gov/lea/docs/LEA%20Match%20Record%20Rev.pdf to print a copy of the record layout requirements.

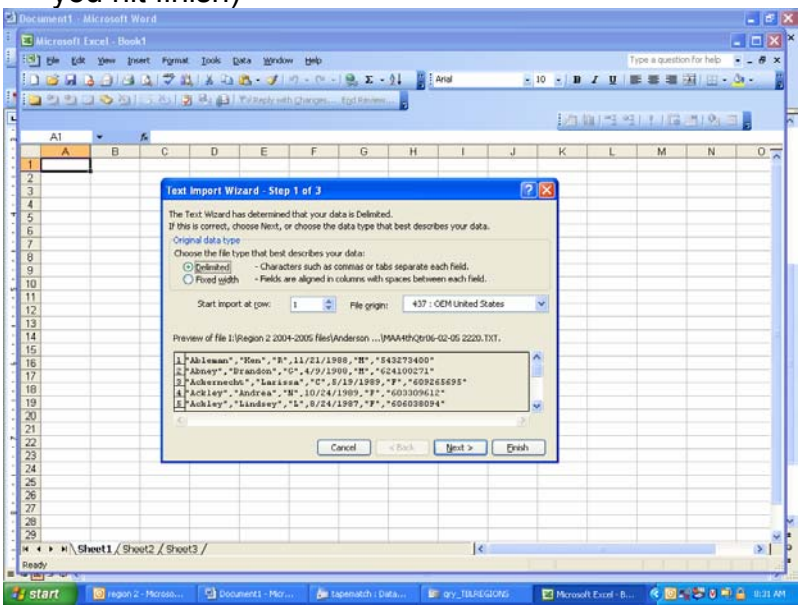


   a. Close and save the table. Close and save the database.

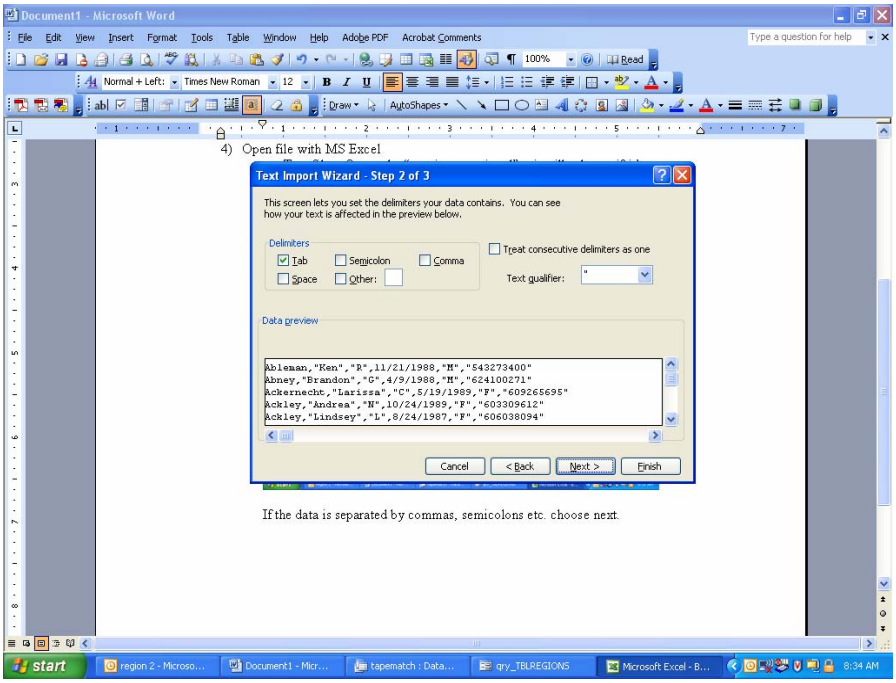
5. Download or output a student population data file (the total number of individuals served by the claiming unit, CDHS Manual pg.10-1) from district system as a text or excel file. This data file should be from the 1st and 3rd or 2nd and 4th fiscal quarters (CDHS Manual page 11-5).

6. Open the file with MS Excel

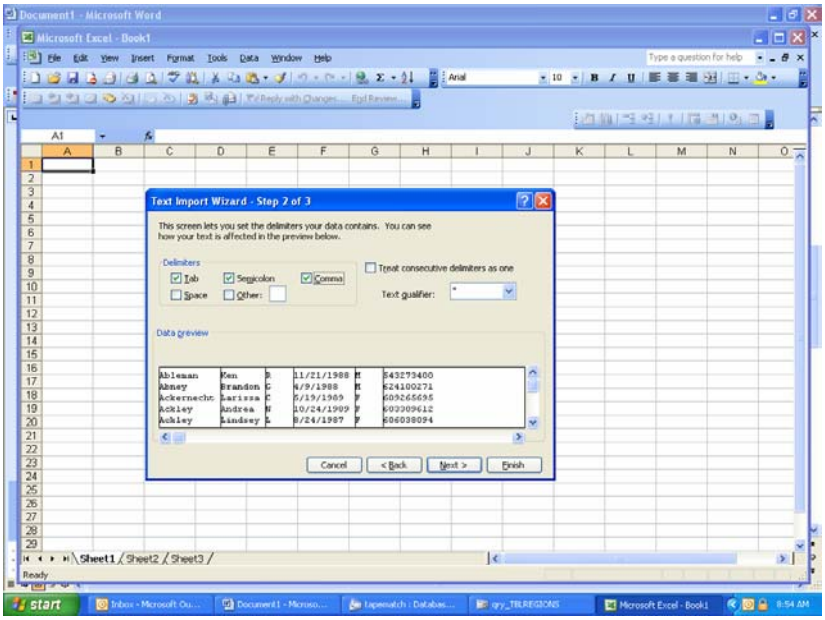
a. Text file – Opens the “text import wizard” – it will ask you if it’s delimited or fixed width (in the case of fixed width it will have lines dividing the columns and you hit finish)



b. If the data is separated by commas, semicolons, etc., choose next. That will give you the opportunity to define the separators.

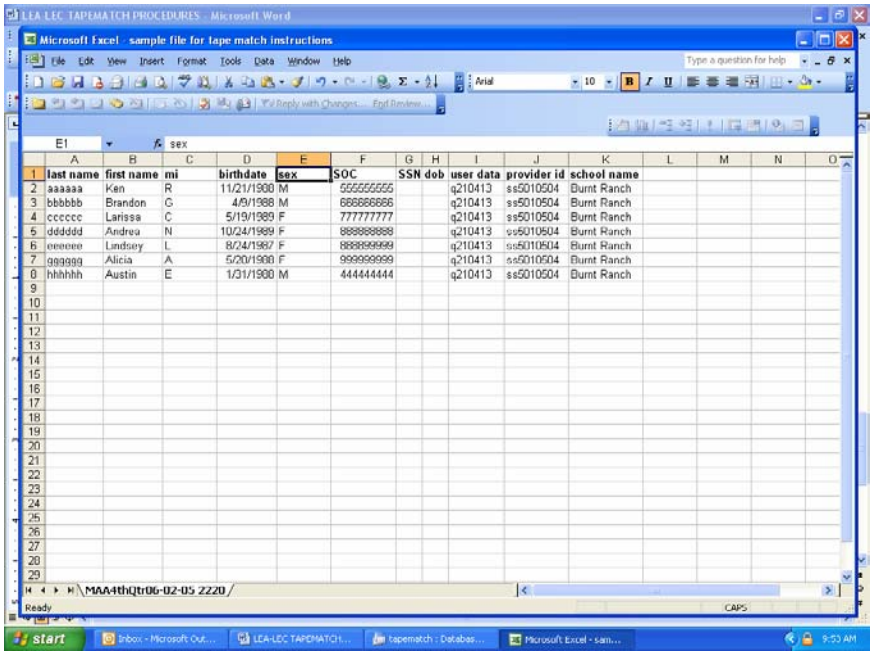


c. In this case, I would choose semicolon and comma, and the result is the data lines up in columns:



d. Click finish at this point and you will have finished the text file import into Excel.
e. Insert a row at the top and label the columns as indicated:
   Last name, first name, mi, birthdate, soc and sex.
f. Insert these additional fields: SSN, DOB, user data, provider id and school name (even if the Social Security column is labeled SSN, re-label SOC and add a new column SSN.
   Note: User data can be any locally defined information you would like. I use the CDS number and a quarter identifier, ie. q461507.

g. Fill in the user data, provider id and school name, copying and pasting as necessary to fill the entire columns for each name in the file, for instance, Q210413, ss5010504, Burnt Ranch.



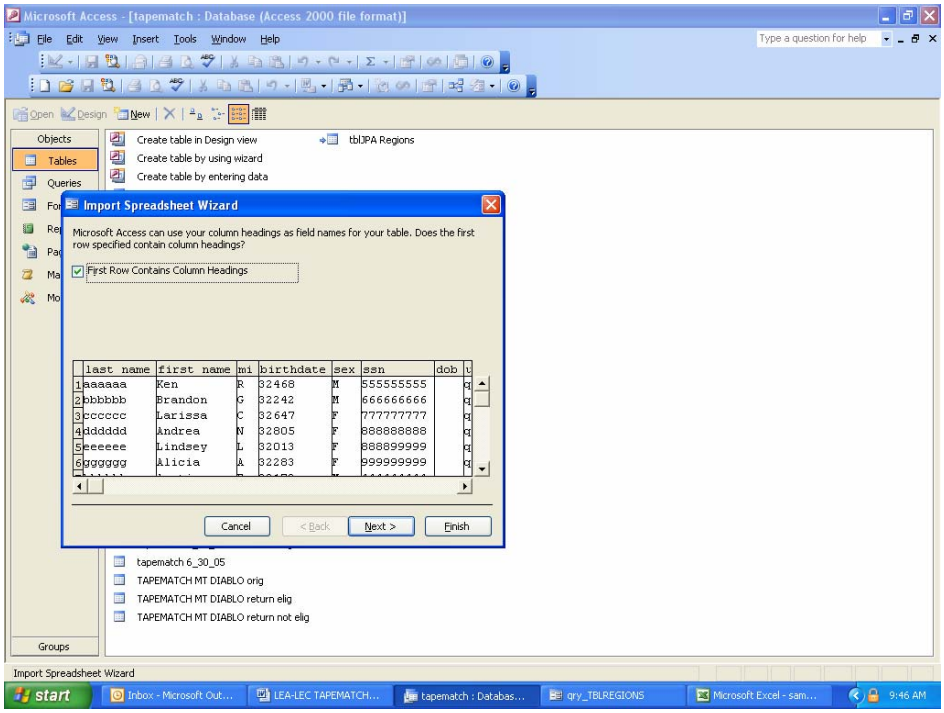
h. Save this file as an “Excel Worksheet” and close.

6. EXCEL file. If the file is already in an EXCEL format, open and insert a row for labels and/or relabel the columns making sure they are labeled precisely as indicated as the above step: **Last Name, First Name, MI, Birthdate, Sex (not gender) and SOC, *adding a DOB, SSN, user data, provider id and school name column*.**

7. Fill in the user data, provider id and school name as in step 5 above. Save and close this file.

8. Open the “database” you created in step 3.

9. On the File menu choose GET EXTERNAL DATA, IMPORT. This will open a find file box. Locate the EXCEL file you had created above, highlight the file and then click IMPORT. This opens the ACCESS IMPORT SPREADSHEET wizard.

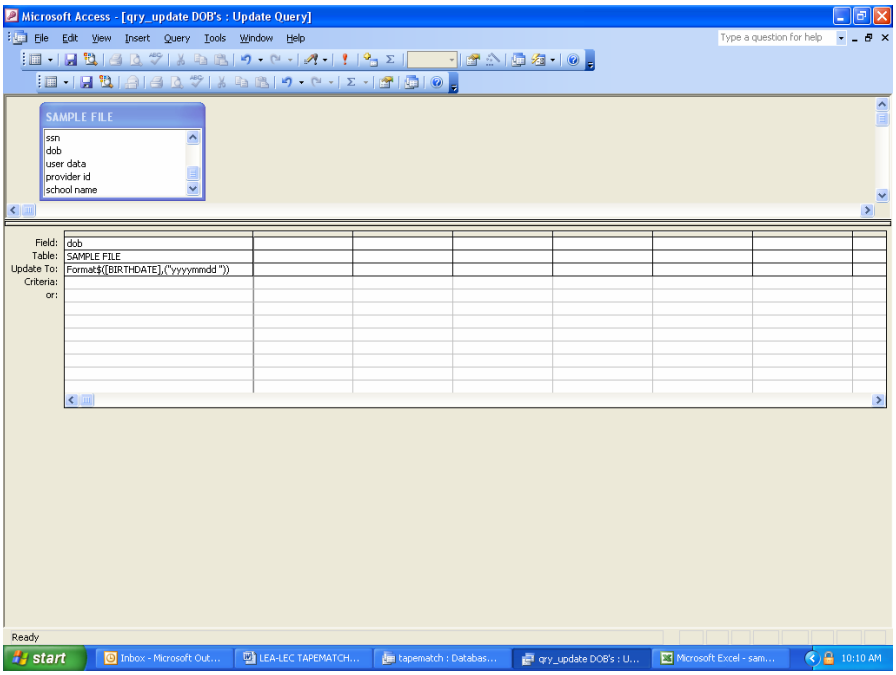


a. Click on the “First row contains column headings” and FINISH. This file will import with the worksheet name as a new table so you might want to rename the table; left click, choose rename and give the table a new name, for instance “District”. (Do not call it TAPEMATCH). You will receive a confirmation message of how many records were saved.

Import Errors: Sometimes import errors will occur and a second table will be created. These records are OK in your District or main table: ACCESS is just alerting you that an expected configuration wasn’t found, for instance, a birthdate field was empty. You can look at the import error table and compare the field number to your main table if you’d like to see the problems.

10. Birthdates as mm/dd/yy, ie. 12/25/99 or mm/dd/yyyy, ie. 12/25/1999

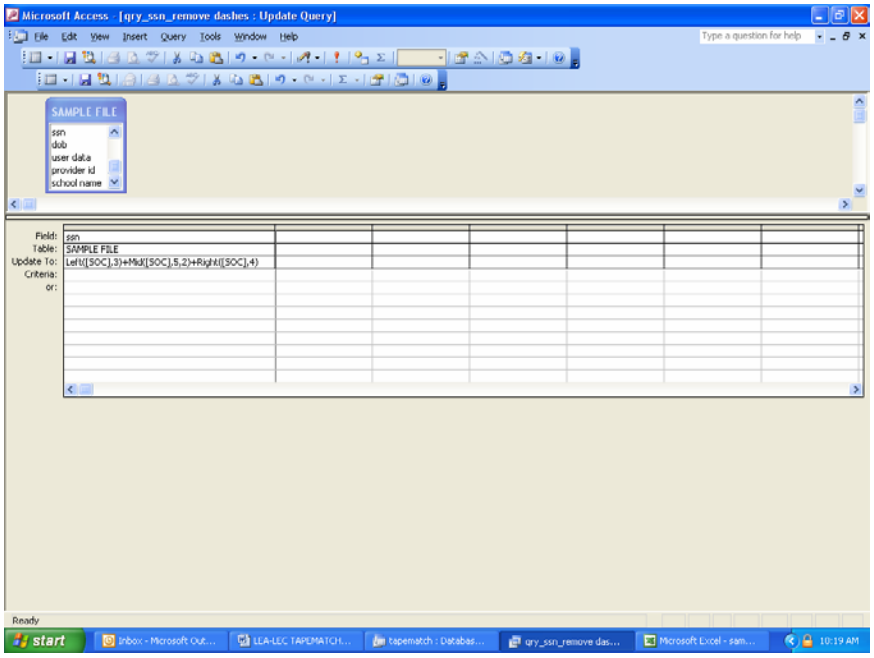
    a. if the birthdates in the file are structured as anything but **yyyymmdd** (year, month, date), 19991225, then we need to convert them to the CDHS format. (This is why we added a blank column labeled DOB to the excel file)
    b. Go to the queries tab in your database.
    c. Create a query in design view
    d. In the Show Table box, highlight the district table and click ADD
    e. Close the box
    f. Choose "DOB" from the table list and double click.
    g. Go to the menu across the top of the database and click on query
    h. Click on "update" query. You will now see an update line in the grid.
    i. In update to: type **Format$([BIRTHDATE],("yyyymmdd "))**



    j. Go to the file menu and QUERY, RUN or use the ! button. This process will verify that you updated the records in your table. (Your original birthdate field is left intact and the DOB field becomes the CDHS acceptable DOB format.
    k. Close and save the query, calling it "Qry to update birthdays."
    l. Go to the Tables tab and open the district table to verify the conversion occurred.
    m. Close.

11. <u>Social Security numbers with dashes:</u>
    a. if the Social Security numbers in the file have dashes, we need to remove the dashes. (This is why we added a blank column labeled SSN).
    b. Go to the queries tab in your database.
    c. Create a query in design view.
    d. In the Show Table box, highlight the district table and click ADD.
    e. Close the box.
    f. Choose "SSN" from the table list and double click.
    g. Go to the menu across the top of the database and click on query.

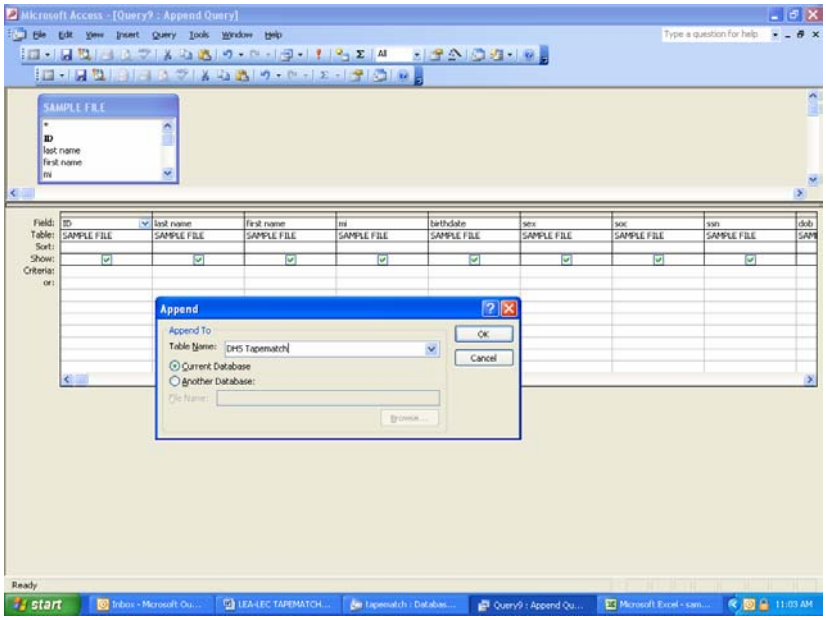
h. Click on “update” query. You will now see an update line in the grid.
i. In update to: type **Left([SOC],3)+Mid([SOC],5,2)+Right([SOC],4)**



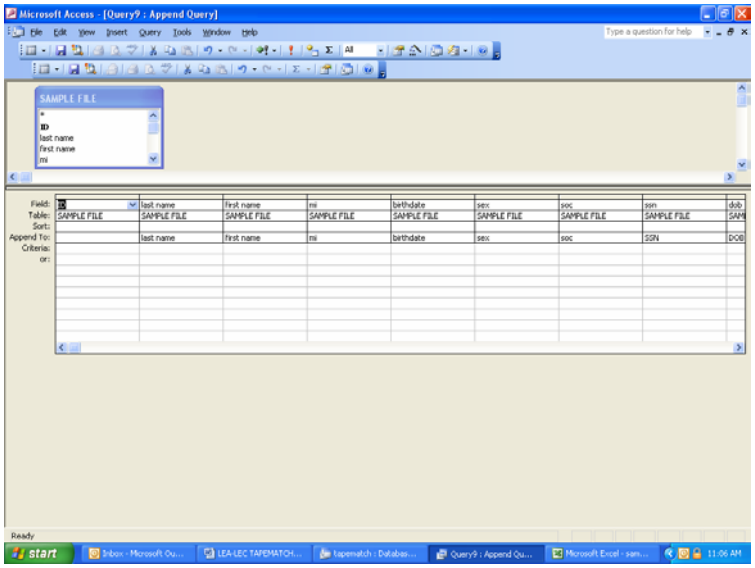
j. Go to the file menu and QUERY, RUN or use the ! button. This process will verify that you updated the records in your table. (Your original birthdate field is left intact and the DOB field becomes the CDHS acceptable DOB format.
k. Close and save the query, calling it “Qry to update birthdays.”
l. Go to the Tables tab and open the district table to verify the conversion occurred.
m. Close.

12. Getting the file into the CDHS Tapematch format.
Your file may have some extra information, for instance, middle names instead of middle initials or an ID field etc. This step enables us to append the “district” table data into the CDHS Tapematch file in exactly the format CDHS requires.

a. Go to the Queries tab.
b. Create a new query in design view.
c. In the show table box, highlight your “district” table and click Add.
d. Close the box.
e. Double click on the blue in the table box and drag down to the grid or Add each field into the query by double clicking on it.
f. Go to the menu across the top of the database and click on query.
g. Click on “append” query. A box will open for you to choose the table you want to append to.
h. Using the arrow, choose the CDHS Tapematch table and click OK.



i. After you say OK, a new line appears that says Append to and the names of the fields that you will be appending from your district table into the CDHS tapematch file will be visible.

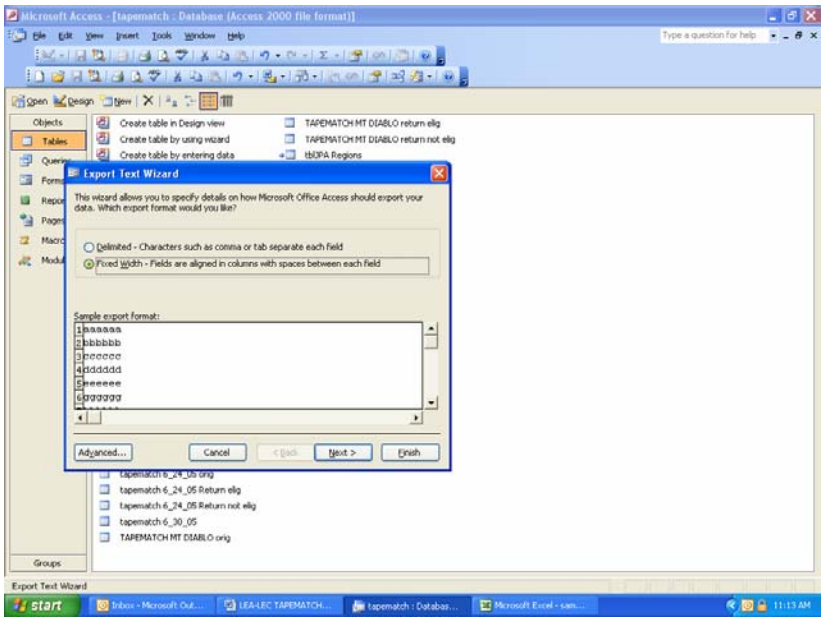


j. Go to file menu QUERY and RUN or use the !. You will get a confirmation that so many records have been appended to the table "CDHS Tapematch."
k. Close the query and save as "Qry to append to tapematch file."

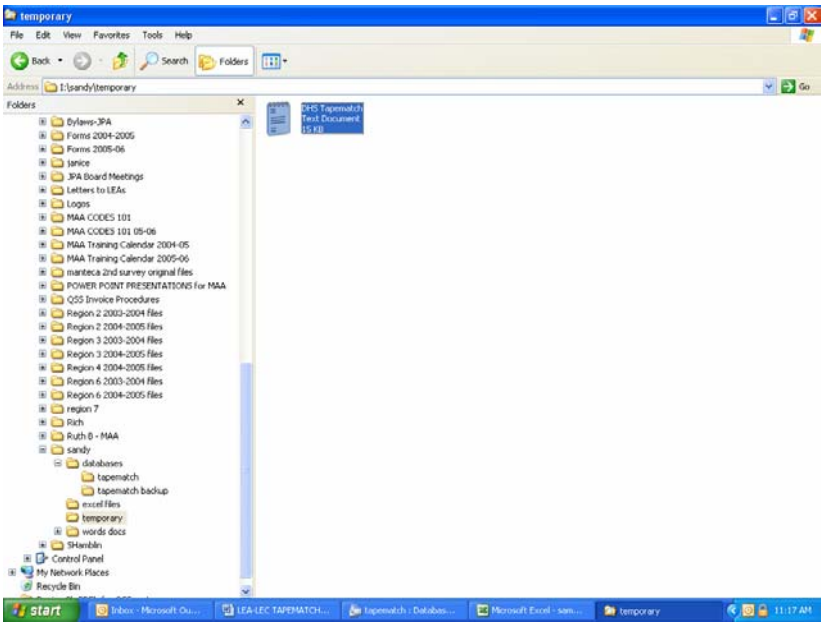
13. Sending the file to CDHS

a. Go to the Tables tab.
b. Highlight (click on) the table "CDHS Tapematch"
c. Go to file menu and choose "EXPORT".
d. In the Save as Type file click on the down arrow and choose"text files" (do not use Rich Text Format).
e. Once you do that, the file name will automatically appear above the save as type.

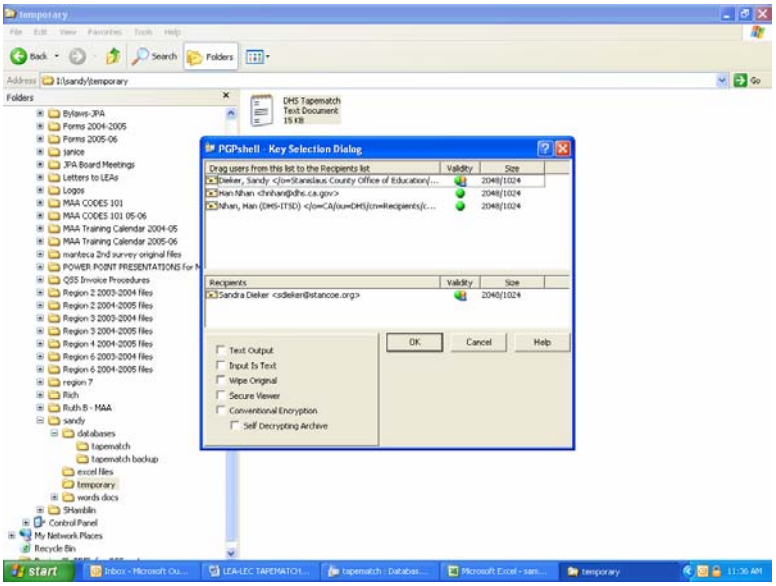
f. In the Save in: at the top, be sure you remember where you've saved the file.
g. Click EXPORT.
h. In the EXPORT Wizard box choose **"Fixed Width" and click Finish.**



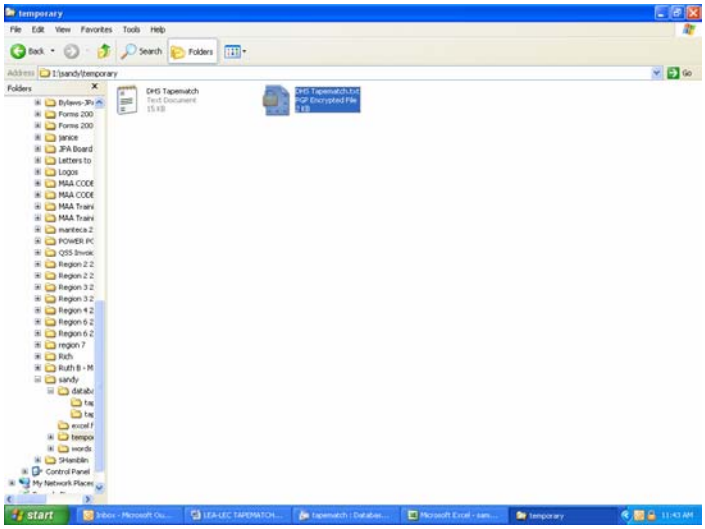
i. This step has converted the ACCESS table to a text file with the same name as the table, "CDHS Tapematch.txt".
j. Locate the new "CDHS Tapematch" txt file in your directory.
k. Highlight the file.



l. Left click with your mouse.
m. A box opens that will let you pick some options.
n. Find PGP on the list and choose Encrypt. The following box opens:



o. Click on Han Nhan's name and drag it down to the recipients box and click OK. You will now have a file created with the same name but the file type is **"PGP Encrypted"**.



p. Choose or highlight the PGP encrypted file, left click and choose send to mail recipient. In the outlook box type HNhan@CDHS.ca.gov and send.

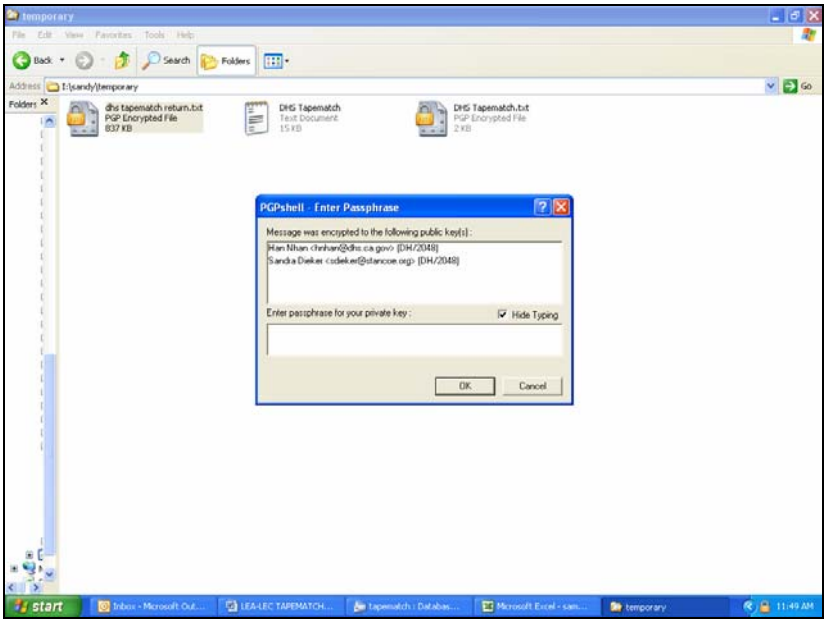
File Returned from CDHS

1. Once you receive the file back from CDHS (usually the next day) you will need to decrypt and verify.

2. Double click on the attachment and Save the file to your local directory, don't open.

3. Locate the file and left click mouse to get the list of options.

4. Find PGP and choose decrypt and verify. A dialogue box will open.

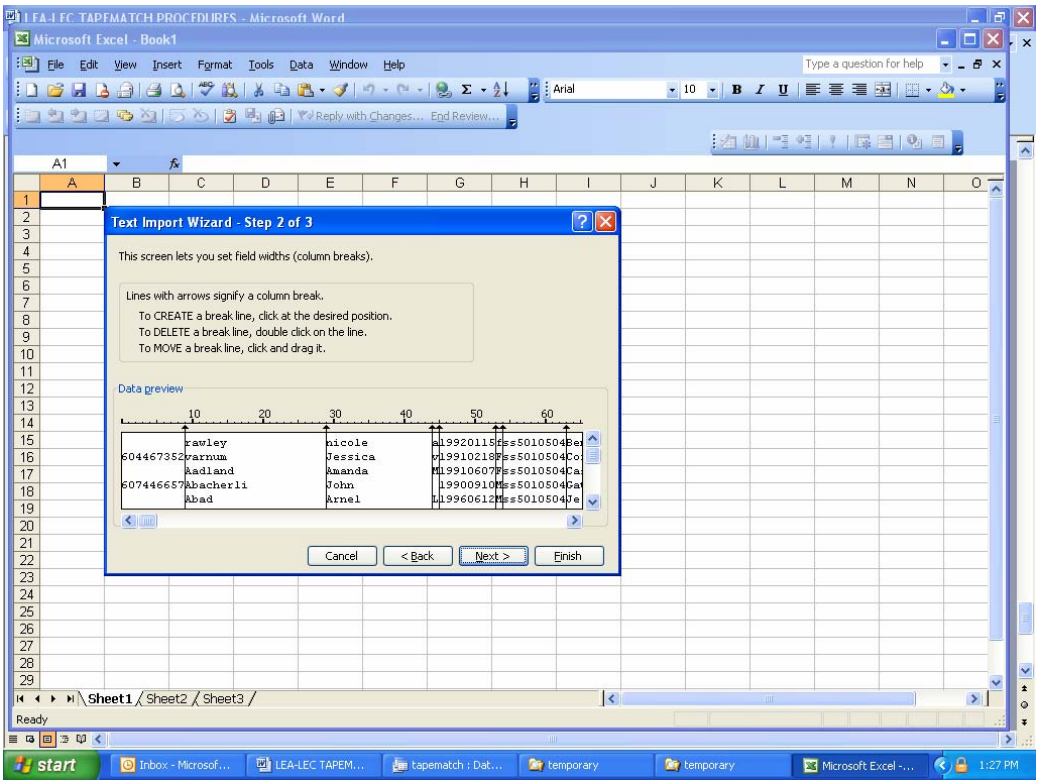


5. In the “Enter passphrase for your private key” type the password you originally set up with CDHS in step 1. The file will automatically save as a Text with the word return in the name.

6. Open EXCEL, locate this returned file and then double click to open the file.

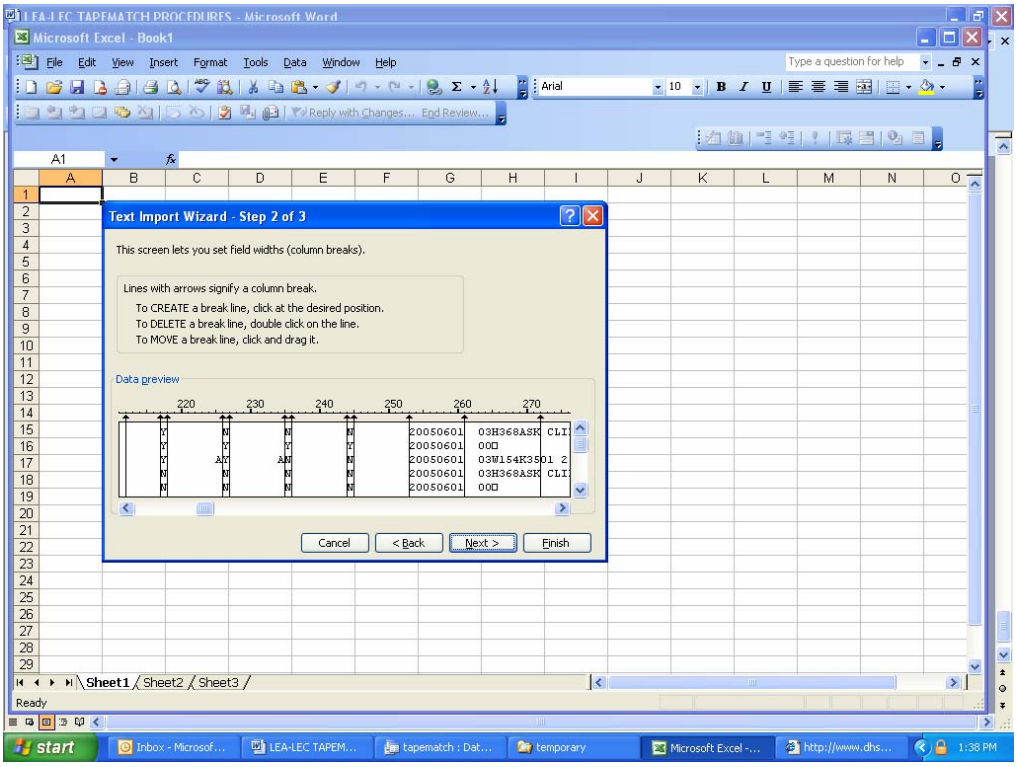
7. A Text Import Wizard box will open. Choose **Fixed Width and NEXT**

8. This next step is the most crucial too interpreting the eligibility months. Create, delete or move line breaks according to the CDHS format:



a. You'll notice in the Data Preview box that the import wizard has a ruler. Be very careful to make sure you create or delete lines according to the LEA Match Record Layout if possible. For instance, the SSN number starts at 1 and goes to 9, the last name column starts at 10 and goes to 29, number 30 starts the First Name, etc. You will need to create and delete lines all the way to the number 261 which is the Meds Current Date or "download date" from CDHS. You'll notice as you scroll through this ruler and file that a lot of columns consist of Y and N.

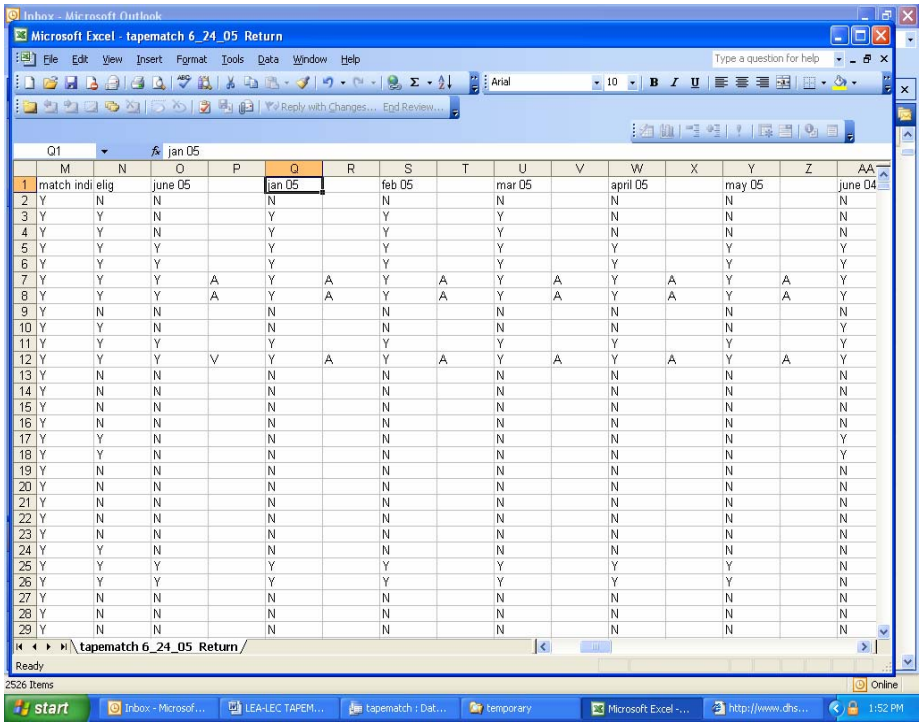
Hint: Put a line directly in front of and behind every column with an N or Y. These columns will be your monthly eligibility indicators. An example follows:

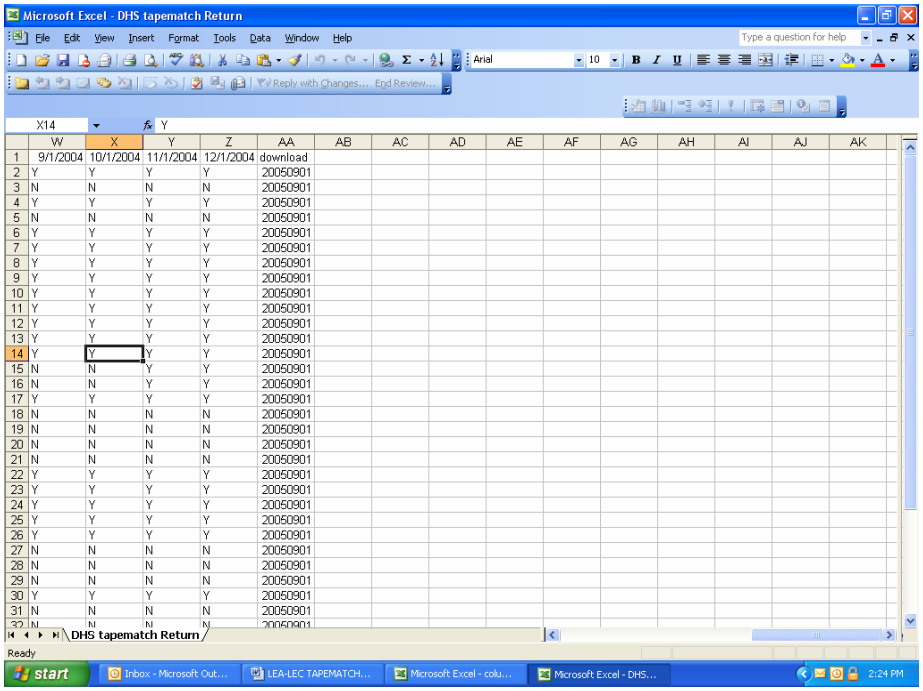


b. Everything after the "Meds Current Date" is not necessary for our "Tapematch purposes". Once you get to that point, click Finish.

9. Save this file as an "Excel Workbook".
10. Open the Excel file
11. Insert a row at the top
12. Label each column consistent with your names from the original "CDHS Tapematch" file you sent, ie. SSN, Last Name, First Name etc.
13. After the column that is the Beneficiary ID Card number and Matched Meds ID (it looks like this 94430826A45101622429623) is the match indicator and they should all have Y's.
14. The next column with Y or N is the Record Eligibility Indicator (if they were eligible in the last 12 months).
15. The next column with Y or N is the current month eligibility indicator. ie. if your Meds Current Date is 20050601 then that is the Y or N eligibility for June 2005.
16. The Next column with a Y or N is the January eligibility indicator, ie. January 2005 (the same year as the Meds Current Date.)

17. The next column with Y or N after January will be February 05, March 05, April 05, May 05 etc. until you get to the download month, in this case, June 05. Since you already have a June 05 column the next column with an Y or N would be June of the previous year or June 2004.
18. Each column with Y or N after June 2004 would be July 2004, August 2004 all the way to December 2004.
19. December 2004 should be the last Y or N column before the Med Current Date. If this doesn't work out, you need to redo the original "returned" file from CDHS and adhere to Lea Match Record Layout.





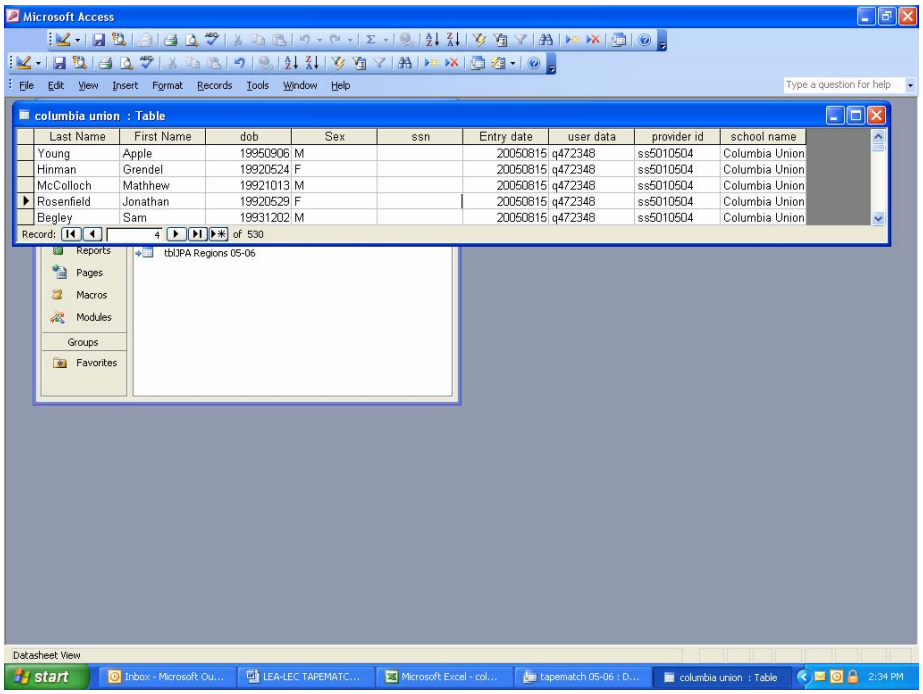
20. Once you have these columns all labeled, close and save the file.

Append the file to ACCESS for the Calculation

1. Open the ACCESS Tapematch file.
2. Go to FILE, click on GET EXTERNAL DATA, and click on IMPORT.
3. In the dialogue box, find the EXCEL FILE that was returned from CDHS, select or highlight and click IMPORT.
4. You may be notified that ACCESS will automatically assign field names and the Import Spreadsheet Wizard will open. Be sure and check "first row contains column headings" and then click Finish. You now have a table to perform the Tapematch calculation.

Performing Tapematch Calculation

1. Create a new query.
2. Add the user data or school name and each of the months of the quarter you need to match. For instance, if you want to match on a 2nd quarter file then only use those months of eligibility in the file, ie. Oct. 04, Nov. 04 and Dec. 04.
3. Run the query.
4. Highlight all three columns and sort AZ ascending on the months, i.e., Oct., Nov., and Dec.
5. Scroll or go to the first record that has a Y for one of those months.
6. Place your cursor on the record above it that didn't have any Y's for those three months.
7. In the bottom left hand corner of the query is a record count box. The number in the box is the record number of where your cursor is on the record above the first eligible student. The next number is the total number of records in the table.
8. Subtract the current record number from the total in the file. That is the total number of eligible students for that quarter or students that were eligible in any one month of that quarter.



9. If the original school population sent to CDHS was 1000 and you had 200 returned eligible, the formula is 200 divided 1000 or 20% tapematch.